



PROC343: Procurement Approvals

Web Based Training



Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will show you Procurement approvals.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed.





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INTRO101: Cardinal Overview

CARDINAL™

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Web Based Training

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Rev 3/1/2012



Course Objectives

In the course, we will discuss the following topics:

- Requisition Approval
- WebIMS Requisition Approval
- Purchase Order and Change Order Approval
- Strategic Sourcing Event Collaboration
- PCard Approval
- ISSP Approval
- Procurement Contract Approval



Lesson 1: Requisition Approval

A request for approval is triggered when a user (Purchase Requisition Processor) submits a Regular or WebIMS Restock requisition for approval.

Cardinal sends each approver an e-mail notification when a requisition is ready for approval processing. All requisitions that require approval processing also appear on the worklist.

The approver can approve the requisition from the worklist link, from the email notification link, or from the **Manage Requisition Approvals** page.



Requisition Approval (continued)

Requisitions require two levels of approval:

- **Supervisor:** The Purchase Requisition requester's supervisor is the first level of approval, unless it is entered by the requestor's supervisor. This approver can approve or deny the requisition.
 - If the requisition is entered by the requestor's supervisor, it goes to the supervisor's supervisor for approval. If the requisition is not approved within 48 hours, workflow routes the requisition to the next level supervisor.
 - Approvers can add other relevant users as ad-hoc approvers or reviewers.

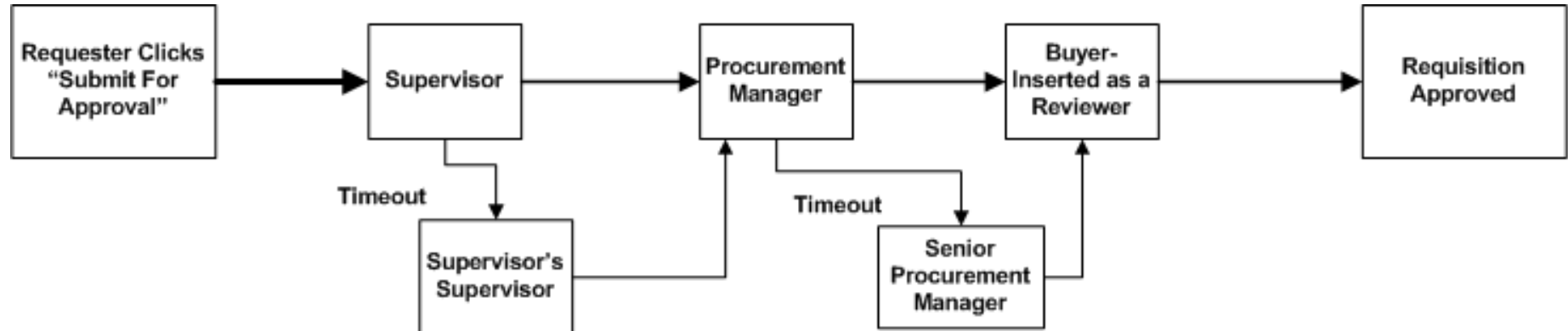


Requisition Approval (continued)

- **Procurement Manager:** Once the first level (Supervisor level) approves the requisition, it routes to the Procurement Manager for approval. This approver can approve or deny the requisition.
 - Procurement Managers are part of a pooled approvers list. A requisition that requires approval at the second level of approval is directed to all of the approvers in that pool. Any approver in the pool can take action on the requisition; the requisition approval appears on all of their worklists. When one of the approvers completes an action on the requisition, it is removed from all of the approvers' worklists, since it has been worked.
 - If the requisition is not approved within 48 hours, the approval request times out at the second level (Procurement Manager) and routes to the Senior Procurement Manager. This approver can choose to approve or deny the requisition.
 - Approvers also have the ability to add other relevant users as ad-hoc approvers or reviewers.
 - **Procurement Managers are required to insert the Buyer as a reviewer before clicking the Approve button.**
 - After final approval, the Purchase Requisition Processor user who entered the requisition (Entered By) receives an email notification as well as a worklist item showing the approval. . The same is also sent to the requisition requester.



Requisition Approval (continued)





Requisition Approval Steps

Requisitions are approved either from the worklist link, from the email notification link, or from the **Manage Requisition Approvals** page. You can navigate to the worklist through the following path:

Main Menu > Worklist > Worklist

The steps to approve a requisition from the worklist are:

- Click the link on the worklist for the requisition you need to approve.
- Review the requisition carefully by selecting the line(s) you need to review and by clicking the **View Line Details** button to see additional details. Review all details based on relevant policies
- Click **on Review/Edit Approvers** to view and or edit selected Approvers or Reviewers.
- To approve, click the **Approve** button.
- To deny a requisition, click the **Deny** button. If the requisition is denied, the approver must add comments. The user (Entered By) is then notified by email and worklist item, and given the option to cancel the requisition, or modify and re-submit. An e-mail is also sent to the requisition requestor. After a denied requisition is edited, saved, and re-submitted, it goes through the entire approval process again.

The **Manage Requisition Approvals** page can be accessed through the following path:

Main Menu > Purchasing > Requisitions > Manage Requisition Approvals



Requisition Approval Steps (continued)

Home | Worklist

Favorites | Main Menu > Worklist > Worklist

New Window ? Help

Worklist for STACY.MCCRACKEN: McCracken, Stacy (VDOT)

Detail View Work List Filters: [dropdown] Feed [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link		
Hall, Mike (VDOT)	04/22/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	<div>Requisition, 280057, 50100, 1901-01-01, N, 0, BUSINESS UNIT:50100 REQ ID:0002040320</div>	Mark-Worked	Reassign
Hall, Mike (VDOT)	04/18/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	<div>PurchaseOrder, 171571, 50100, 1901-01-01, N, 0, BUSINESS UNIT:50100 PO ID:0001056490</div>	Mark-Worked	Reassign
Hall, Mike (VDOT)	04/11/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	<div>PurchaseOrder, 171551, 50100, 1901-01-01, N, 0, BUSINESS UNIT:50100 PO ID:0001056486</div>	Mark-Worked	Reassign
Hall, Mike (VDOT)	04/10/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	<div>PurchaseOrder, 171541, 50100, 1901-01-01, N, 0, BUSINESS UNIT:50100 PO ID:0001056482</div>	Mark-Worked	Reassign
Hall, Mike (VDOT)	04/09/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	<div>PurchaseOrder, 171531, 50100, 1901-01-01, N, 0, BUSINESS UNIT:50100 PO ID:0001056488</div>	Mark-Worked	Reassign
SCOTT, LINDA	04/03/2013	Approval Routing	Approval Workflow	3-Low [dropdown]	<div>VoucherApproval, 238867, 50100, 1901-01-02, N, 0, BUSINESS UNIT:50100 VOUCHER ID:00146155 RDC:RA0A</div>	Mark-Worked	Reassign



Requisition Approval Steps (continued)

Requisition Approval

Business Unit:50100

Requisition ID:0002040320

Requisition Name:Cardinal Training

Requester:[Hall, Mike \(VDOT\)](#)

Entered on:04/22/2013

Status:Pending

Priority:Medium

Total Amount:176,800.00 USD

Requester's Justification:
Requesting Construction Consulting services for a period of 1 year.
Current contract expires this June and a new contract needs to be put in place.
MJH 4/20/13

Edit Requisition

[View printable version](#)

Line Information

Review/Edit Approvers

Req for Supervisor Action

MJH:Pending

Start New Path

Req - Requester's Supervisor

Pending

McCracken, Stacy (VDOT)

Requester's Supervisor

Req for Procurement Mgr Action

MJH:Awaiting Further Approvals

Start New Path

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer

Enter Approver Comments

Approve

Deny

[Return to Worklist](#)



Requisition Approval Steps (continued)

To select and add an **Approver** or **Reviewer**, click on the green plus sign icon. The selected user is inserted into the approval flow as shown.

https://finsitweb.covtest.virginia.gov/psc/finsit_2/EMPL...

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: Sartini, Tim N. (VDOT)

Insert as: ☒ Approver ☐ Reviewer

CARDINAL

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

View Approvals

Business Unit: 50100 Number of Lines: 1
Requisition ID: 0002058861 Total Amount: 8,233.00 USD
Requisition Name: 0002058861
Requested For: Hall, Mike (VDOT)
Status: Pending

Req for Supervisor Action

Requisition 0002058861: Pending

Req - Requester's Supervisor

Pending McCracken, Stacy (VDOT)
Requester's Supervisor

Not Routed Sartini, Tim N. (VDOT)
Inserted Approver

Req for Procurement Mgr Action

Requisition 0002058861: Awaiting Further Approvals

Req - Procurement Manager

Not Routed Multiple Approvers
Approval Assignment to Buyer



Requisition Approval Steps (continued)

If/When **Multiple Approvers** is shown, click on the hyperlink to view the listing of persons that are able to approve. The item will be present on each approver's worklist for action.

Once approved by any one of the approvers, it will fall off all worklists and move on as assigned.

Requisition 0002058861: Awaiting Further Approvals

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer


Approver #1	
Name:	Mike Hall
Empl ID:	
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	08687
Email ID:	@vdot.virginia.gov

Approver #2	
Name:	Tim Sartini
Empl ID:	
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	22892
Email ID:	@vdot.virginia.gov

Approver #3	
Name:	Johnny Bgood
Empl ID:	



Requisition Approval Steps (continued)

**CARDINAL**

Home | Worklist

Favorites | Main Menu > Worklist > Worklist

Requisition Approval

Business Unit: 50100

Requisition ID: 0002040320

Requisition Name: Cardinal Training

Requester: [Hall, Mike \(VDOT\)](#)

Entered on: 04/22/2013

Status: Pending

Priority: Medium

Total Amount: 176,800.00 USD

Requester's Justification:
Requesting Construction Consulting services for a period of 1 year.
Current contract expires this June and a new contract needs to be put in place.
MJH 4/20/13

Edit Requisition

[View printable version](#)

Line Information

Line Information

Customize | Find | First 1 of 1 Last

Line	Item Description	Vendor Name	Quantity	UOM	Price
<input type="checkbox"/>	1 CONSTRUCTION CONSULTING CONS...	S&ME INC-001	2,080.0000	HUR	85.00000 USD

Select All / Deselect All

View Line Details

Review/Edit Approvers

Enter Approver Comments

Approve

Deny

[Return to Worklist](#)



Simulation: Approving Requisitions

You are now about to view a simulation on approving a requisition. Click the Cardinal logo below to start the simulation.





Lesson 2: WebIMS Requisition Approval

The following are categorized as WebIMS Requisition Types:


- Issuance
 - External Sales – Non-State Agency
 - External Sales – State-Agency
 - Work in Progress (WIP)
- Restock

Issuance requisitions, External Sales, and Work in Progress do not require a workflow approval process. They are automatically approved once the **Submit for Approval** button is clicked by the Storekeeper.

Restock requisitions require a workflow approval process, which follows the same process as a regular requisition as previously shown.



WebIMS Requisition Approval Steps (continued)

Home | Worklist

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help

Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type: Inv Issue Status: **Open** ☒

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

▼ Header

*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#)
*Requisition Date: 07/31/2013 [Add Comments](#)
Origin: ONL Online Input [Requisition Activities](#)
*Currency Code: USD Dollar [Amount Summary](#)

Total Amount: 823.30 USD

Add Items From


[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line										Customize Find View All First 1 of 1 Last	
Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS			
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1	7754577327	SALT, SODIUM	10.0000	LTN	7754577	82.33000	823.30	Open			

[View Approvals](#) *Go to:

17





Home | Worklist

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window ? Help

Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type Inv Issue Status: **Approved** ✖

Requisition ID: 0002063751

Requisition Name: 0002063751 ☐ Hold From Further Processing

▼ Header

*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#)

*Requisition Date: 08/05/2013 [Add Comments](#)

Origin: ONL Online Input [Requisition Activities](#)

*Currency Code: USD Dollar [Document Status](#)

Amount Summary

Total Amount: 8,233.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Select Lines To Display

Line: To:

Line

Customize Find View All First 1 of 1 Last

Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS					
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	7754577327	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	100.0000	LTN	7754577	82.33000	8,233.00	Approved					

[View Approvals](#)

*Go to:



Lesson 3: Purchase Order and Change Order Approval

A request for approval is triggered when a buyer submits a Purchase Order (PO) for approval. Only POs created directly in Cardinal require approval; POs created from a requisition, from SiteManager, or from eVA do not.

Cardinal sends each approver an email notification when a PO is ready for approval processing. In addition, Cardinal sends a reminder e-mail to the supervisor if the PO is not worked within 24 hours. All POs that require approval processing also appear on the worklist.

The Supervisor approves the PO by going to their worklist and clicking on the link provided to access the PO.

POs can be accessed online, or from the worklist link, or from the email notification link.

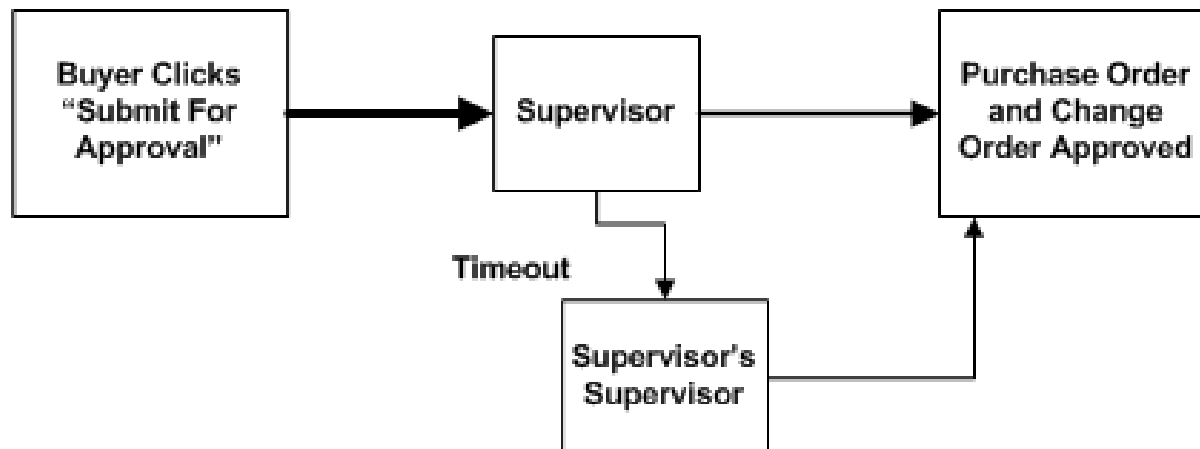
Any change to POs that affect the **Quantity**, **Price**, or **Ship To** fields are called change orders. Change orders also require approval.



Purchase Order Approval

A PO's approval process depends on how it was created:

- **POs created directly in Cardinal (one level):** Are approved by the buyer's Supervisor. The Supervisor can approve, deny, or hold the PO.
 - Cardinal sends a reminder e-mail if the PO is not worked within 24 hours.
 - If a PO is not approved within 48 hours, workflow routes the PO to the Supervisor of the Supervisor. The Supervisor of the Supervisor can approve, deny, hold or push back the PO.
 - The buyer receives an email notification if the PO is approved.
- **POs created from a Cardinal requisition:** Do not need approval since they have already been approved on a requisition. These POs will not appear on any approver's worklist.
- **POs created in Cardinal through the SiteManager interface or the eVA interface:** Do not need approval in Cardinal. These are approved in the Source system.





Purchase Order Approval (continued)

POs can be approved online, or from the worklist link or from the email notification link.

You can navigate to the worklist through the following path:

Main Menu > Worklist > Worklist

To approve a PO:

- Search for the PO you want to approve, click on the relevant link in the worklist to access the PO.
- Click the **View Line Details** button to view details. Review all details based on relevant policies.
- There are three options:
 - To approve the PO, click the **Approve** button.
 - To deny the PO, click the **Deny** button. The user is then notified by email and can edit and resubmit the PO. It then goes through the approval process again.
 - To put the PO on hold, click the **Hold** button. Placing a transaction on hold reserves it for later action related to approval. The hold feature also allows you to prevent other approvers from taking action on the item. The item will not time out while on hold.



Change Order Approval (continued)

Purchase Order Approval

Business Unit: 50100
PO ID: 0001056490
PO Total: 5,661,072.41 USD
Vendor ID: 0000034409 Telvent USA LLC
Buyer: MIKE.HALL
PO Reference: NORTHERN REGION TOC OPERATIONS

PO Status: Pend Appr
PO Date: 04/18/2013

Justification:
Inserted Line 2 "TASK ORDER # 1" for Bristol project. Value of TO is \$61,072

Review Lines

Line Details							
Customize Find View All First 1-2 of 2 Last							
Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	NORTHERN REGION TOC	1.0000	EA	5,600,000.00000	5,600,000.00	USD
<input type="checkbox"/>	2	TASK ORDER # 1	1.0000	EA	61,072.41000	61,072.41	USD

☐ Select All / De-select All

View Lines Details

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001056490: Pending

View/Hide Comments

Start New Path

Buyer Supervisor for ChngOrd

Pending

McCracken, Stacy (VDOT)

Buyer's Supervisor

Comment History

Approval Comments

Approve Hold Deny

Return to Worklist Approval History



Change Order Approval

Changes to a PO (change orders) also go through an approval process when certain conditions are met. Please note change orders created from eVA or from SiteManager do not require additional approval. A request for approval is triggered when a buyer submits a change order for approval.

Cardinal sends the approver an e-mail notification when a change order is ready for approval processing. All change orders that require approval processing appear on the worklist. Levels of approval depend on the value of the change order and/or of the original PO. Cardinal sends a reminder e-mail if the change order is not worked within 24 hours.

The approver approves the change order either online, from the worklist link or from the email notification link.

Cardinal uses change orders to track changes made to a PO. Cardinal compares the originally approved PO amount to the new PO amount. If a PO is changed multiple times, the difference is evaluated using the originally approved PO amount and all change orders that have been applied.

Please note that SiteManager and eVA Purchase Order Change Orders are approved prior to being interfaced into Cardinal.



Change Order Approval (continued)

POs that have change orders attached to them go through a specific approval process that depends on the difference between the originally approved PO amount, the change order amount: or adding a line.

- **Route to Supervisor (one level only)**
 - All change orders: With an original PO value of less than \$50,000 and that contain a change of 25% or more from the original value of the PO.
 - All change orders: With an original PO value of more than \$50,000, that contain a change of 25% or more from the original value of the PO, and with a change amount of less than \$50,000.



Change Order Approval (continued)

- **Route to Supervisor, Procurement Manager, Senior Procurement Manager, and Administrative Services Division (ASD) Director (four levels of approval)**
 - All change orders: With an original PO value of \$50,000 to \$199,999.99 with a change amount of \$50,000 or more.
 - All change orders: With an original PO value of \$200,000 or more, that contain a change of 25% or more from the original value of the PO.
 - Procurement Managers (second level), Senior Procurement Managers (third level), and ASD Directors (fourth level) are part of a pooled approvers list. A change order that requires approval at the second, third and fourth level of approval is directed to all of the approvers in that pool for each respective level of approval. Any approver in the pool can take action on the change order; the change order approval appears on all of their worklists. When one of the approvers completes an action on the change order, it is removed from all of the approvers' worklists, since it has been worked.

If none of the change order conditions above are met, no routing or approvals are required for the change order.



Purchase Order Approval (continued)

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Customize Page

Purchase Order Approval

Business Unit: 50100
PO ID: 0001005322
PO Total: 10,000,000.00 USD
Vendor ID: 0000003676 Parsons Brinckerhoff Construction Servic
Buyer: MIKE.HALL
PO Reference: HAMPTON ROADS-CONTR, 3 (2006)

PO Status: Pend Appr
PO Date: 01/31/2012
Justification:
No justification entered by buyer.

Review Lines

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001005322: Pending

View/Hide Comments
Start New Path

Buyer Supervisor for ChngOrd

Pending

McCracken, Stacy (VDOT)
Buyer's Supervisor

Comment History

CO for Procurement MNGT Action

Purchase Order 0001005322: Awaiting Further Approvals

View/Hide Comments
Start New Path

Chng Ord - Orig Val > 50000

Not Routed

Multiple Approvers
Procurement Manager Approval

Not Routed

Sager, Alcinda "Cindy" (VDOT)
Sr Procurement Mgr Approval

Not Routed

Pride, Lisa M. (VDOT)
ASD Director Approval

Comment History

Approval Comments

Approve Hold Deny

[Return to Worklist](#) [Approval History](#)



Simulation: Approving Purchase Orders

You are now about to view a simulation on approving or denying a purchase order. Click the Cardinal logo below to start the simulation.





Lesson 4: Strategic Sourcing Event Collaboration

A Collaborator can be added at the beginning or at the end of an event to provide input.

A request for collaboration is triggered when an event creator (Strategic Sourcing Buyer) invites one or several Collaborators to provide input for an event.

Cardinal sends an email notification to the first Collaborator set up in the routing sequence assigned on the event. This email notifies the collaborator that their input has been requested for the event. Other Collaborators set up for the event receive a worklist and email notifications only once the previous Collaborators complete their analysis.

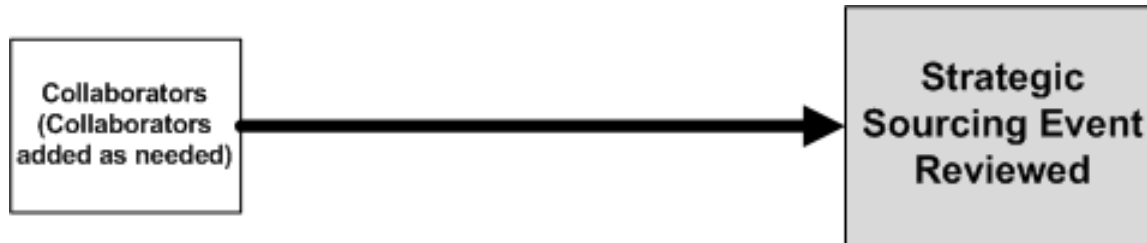
Each Collaborator accesses the event to provide input to the event either from the worklist link, from the email notification link, or from the **Analyze Events** page.



Strategic Sourcing Event Collaboration (continued)

Strategic Sourcing Events can have one or several Collaborators invited by the Strategic Sourcing Buyer when creating the event. Collaboration may be required for solicitations above the buyer's delegated authority. Each Collaborator completes their input following the routing sequence assigned to the event.

To learn more about Collaboration, please refer to the **Strategic Sourcing Collaboration** job aid.





Strategic Sourcing Event Collaboration (continued)

Each Collaborator provides input to the event either accessing it from the worklist link, from the email notification link, or from the **Analyze Events** page.

You can navigate to the **Analyze Events** page through the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

To provide input to the Strategic Sourcing event:

- Search for the event you need to provide input for on the **Analyze Events** page.
- Review all details based on relevant policies.
- Click the **Analysis Complete** button. This completes your review and marks your collaboration as complete. Clicking this button also routes the event to the next Collaborator in the routing sequence assigned to the event, if applicable.
- If the due date has past and no action has been taken, an email notification and worklist item are sent to the event creator.



Strategic Sourcing Event Collaboration (continued)

Favorites

Main Menu > Sourcing > Maintain Events > Analyze Events

New Window Help Customize Page http

Analyze Total

Analyze Line

Business Unit: 50100

Event ID: 0000150098

Round: 1

Version: 1

Event Name: Test Collab 2

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 07/12/2011 5:16PM EDT

Status: Collaborating Bid Analysis

Go To: ...

Bid Analysis and Display Options

Analysis

Event Version Responded To:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	13,258.0000	12,750.0000	12,000.0000
Total Bid Cost	0.00	0.00	0.00
Total Event Score:	0.0000	0.0000	0.0000
Total Header Cost	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

Bid Action

Reject Reason:

Award by Percent:

Hide Bid

NA

NA

NA

Recalculate

Analysis Complete

Unhide Bids

<<

<

>

>>

Save

Return to Search



Lesson 5: PCard Approval

PCard transactions are loaded into Cardinal each day from an electronic file that is sent in by the bank. The initial status of the transaction is **Staged**.

The PCard Holder must reconcile each transaction, as soon as possible, to ensure timely approval by their Supervisor.

Reconcile Statement
Procurement Card Transactions

☐ Run Budget Validation on Save

Bank Statement Customize | Find | View All | First 1-9 of 14 | Last

Transaction	Employee Name	Trans Date	Merchant	Status	Transaction Amount	Budget Status	Chartfield Status
1	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	POTOMAC PACKAGING,LLC	Staged	348.00	Valid	Recycled
2	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	85.32	Valid	Recycled
3	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	154.56	Valid	Recycled
4	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	176.74	Valid	Recycled
5	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	234.38	Valid	Recycled
6	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	438.12	Valid	Recycled
7	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	1,961.36	Valid	Recycled
8	<input type="checkbox"/> BLANKENSHIP,TERESA	01/08/2013	SITA - THE SUPPLY ROOM AQ	Staged	5,559.22	Valid	Recycled
9	<input type="checkbox"/> BLANKENSHIP,TERESA	01/09/2013	TAMERAN GRAPHIC SYSTEMS	Staged	7,474.12	Valid	Recycled

☒ Select All ☐ Clear All

[Search](#) [Purchase Details](#) [Split Line](#) [Distribution Template](#)



PCard Approval (continued)

A request for approval is triggered when a PCard Holder changes a PCard transaction status from **Staged** to **Verified**.

An alert on the **PCard Verified Charges by User** pagelet shows that the PCard transaction is ready for approval processing. All PCard transactions that require approval processing appear on the pagelet.

Note: Approvers should regularly refresh the pagelet to see which items they need to process for approval.

The approver must notify the user of any items not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

The Supervisor who is associated to the card approves the PCard on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.


You can navigate to the **Reconcile Statement** page through the following path:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement

Note: Additional information about PCard processing is in the **Using PCards** course.



PCard Approval (continued)



[Favorites](#) | [Main Menu](#)

[Personalize](#) | [Content](#) | [Layout](#)

PCard Verified Charges by User

Name	Trans Date	Merchant	Sum Amount
Bristol, District	2011-01-04	MANAGEMENT CONSULTING INC	12105.6
Bristol, District	2011-01-04	MANAGEMENT CONSULTING INC	85.62
Bristol, District	2011-01-04	MANAGEMENT CONSULTING INC	126.91
Bristol, District	2011-01-04	MANAGEMENT CONSULTING INC	38.86
Tudor, Jacob	2011-01-27	PRSMOKE	69.48
Tudor, Jacob	2011-01-27	PRSMOKE	570



PCard Pagelet

Each PCard approver must set up the appropriate pagelet in order to process PCard approvals. Please note that this pagelet contains that both PCard and ISSP transactions share the same pagelet.

The steps to set up the pagelet are:

- From the Cardinal Home Page, click on **Personalize Content**.
- Click the checkbox for **PCard Verified Charges by User** to select it, then click **Save**.

Refresh and check this pagelet daily, and take appropriate action (i.e., approve or deny the transactions).

CARDINAL

Personalize Content

Welcome Message:

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

- ☒ [myCardinal Messages](#)
- ☒ [myCardinal Financials](#)
- ☒ [PCard Verified Charges by User](#)
- ☒ [Menu - Classic](#)

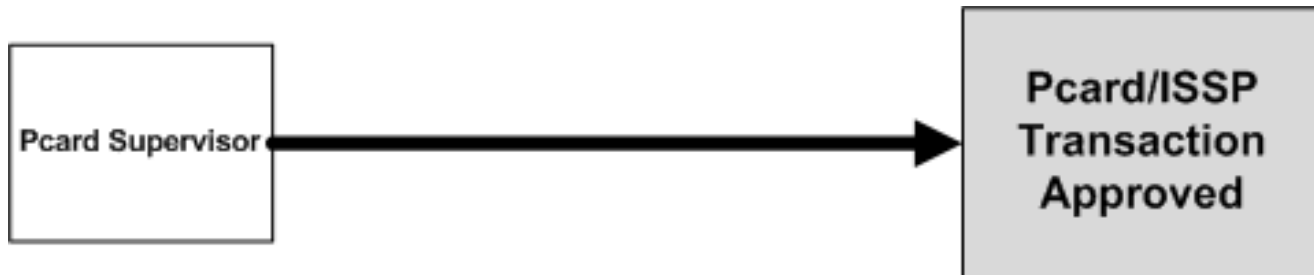
[Return to Home](#)



PCard Approval (continued)

PCard transactions require one level of approval:

- **PCard Supervisor:** The Supervisor(s) who is associated to the card (i.e. may not be the user's Supervisor) is the only level of approval.
 - This approver can approve the transaction, enter a dispute amount if the amount is incorrect, or notify the user if there is an issue with the transaction.
 - Cardinal does not generate an automatic email to the PCard Holder when a PCard transaction is approved. The approver must do so manually. Users can also search for their transaction in Cardinal and check on its approval status.





PCard Approval (continued)

PCard transactions are approved on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.

You can navigate to the pagelet through the following path:

Main Menu > PCard Verified Charges by User (the pagelet can be accessed on the Home page as shown previously)

The following path is an alternative path to the **Reconcile Statement** page:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement

The screenshot displays the 'Reconcile Statement' page for 'Procurement Card Transactions'. It includes a navigation bar with 'Favorites', 'Main Menu', 'Purchasing', 'Procurement Cards', 'Reconcile', and 'Reconcile Statement'. Below the navigation bar, there are checkboxes for 'Display Unmasked Card Number' and 'Run Budget Validation on Save'. The main table lists transactions with columns for Transaction, Employee Name, Card Issuer, Card Number, Trans Date, Merchant, Status, Transaction Amount, and Currency. The table shows 10 transactions, all with a status of 'Verified' and a currency of 'USD'. At the bottom, there are buttons for 'Select All', 'Clear All', 'Stage', 'Verify', 'Approve', and 'Validate Budget'. The 'Select All' button is checked.

Transaction	Employee Name	Card Issuer	Card Number	Trans Date	Merchant	*Status	Transaction Amount	Currency
46	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	2,882.00	USD
47	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	814.00	USD
48	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	273.00	USD
49	ADKINS,LORA	BAVIO	*****4806	12/19/2012	THE OFFICE INC.	Verified	184.80	USD
50	ADKINS,LORA	BAVIO	*****4806	12/19/2012	POTOMAC ENVIRONMENTAL IN	Verified	325.43	USD
51	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	374.00	USD
52	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	490.00	USD
53	ADKINS,LORA	BAVIO	*****4806	12/19/2012	SPECIALIZED ENGINEERING	Verified	465.50	USD
54	ADKINS,LORA	BAVIO	*****4806	12/19/2012	POTOMAC ENVIRONMENTAL IN	Verified	325.43	USD



PCard Approval Steps

To approve a PCard transaction:

- Click on the link for the transaction you wish to review in the **PCard Verified Charges by User** pagelet.
- Review all details based on relevant policies.
- You have two options:
 - Click on the **Approve** button to submit your approval.
 - If the transaction amount is incorrect, you can enter a dispute amount for the transaction.
 - On the **Billing** tab, enter the dispute amount for the transaction in the **Dispute Amount** field.
 - Click the **Comment** icon on the **Transaction** tab to enter a comment about the transaction. The comment should explain why the transaction is being disputed.
 - Then set the transaction status to **Approved**.
- Notify the user of any items you do not approve in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

Approved transactions are transmitted to FleetFocus M5 (Equipment Management System) and also to the Accounts Payable module where vendor payments are processed. The agency pays the full amount and receives a credit for the amount you dispute, if it is correct.



PCard Approval Steps (continued)

Favorites

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement

☐ Display Unmasked Card Number

☐ Run Budget Validation on Save

Bank Statement

Customize | Find | View 100 | First 64-72 of 169 Last

Transaction	Card issuer	Card Number	Trans Date	Merchant	*Status	Transaction Amount	Currency				Budget Status	Chartfield Status
64	BAVI9	*****1350	12/19/2012	LAND L DELIVERY INC	Verified	23.05	USD				Valid	Valid
65	BAVI0	*****1341	12/19/2012	SHOP.MTS.COM	Verified	408.00	USD				Valid	Valid
66	BAVI0	*****4806	12/18/2012	VIRGINIA WASTE SERVICES I	Verified	177.00	USD				Valid	Valid
67	BAVI0	*****4806	12/18/2012	CALIBRATION SERVICES	Verified	1,843.19	USD				Valid	Valid
68	BAVI0	*****4806	12/18/2012	CALIBRATION SERVICES	Verified	238.00	USD				Valid	Valid
69	BAVI0	*****4806	12/18/2012	PERMATREAT PEST CONTROL -	Verified	55.00	USD				Valid	Valid
70	BAVI0	*****4806	12/18/2012	SCHNEIDER LABORATORIES IN	Verified	1,615.00	USD				Valid	Valid
71	BAVI0	*****4806	12/18/2012	PENNONI ASSOCIATES INC	Verified	832.88	USD				Valid	Valid
72	BAVI0	*****1341	12/18/2012	BATTERY BARN	Verified	70.00	USD				Valid	Valid

☒ Select All

☐ Clear All

Stage

Verify

Approve

Validate Budget

Search

Purchase Details

Split Line

Distribution Template



Simulation: Approving PCard Transactions

You are now about to view a simulation on how to approve a PCard transaction. Click the Cardinal logo below to start the simulation.





Lesson 6: ISSP Approval

Note: ISSP transactions are processed through the Cardinal PCard process.

A request for approval is triggered when an ISSP Reconciler changes an ISSP transaction status from **Staged** to **Verified**.

Users only see transactions that are associated to an ISSP location they have been assigned to. An alert on the **PCard Verified Charges by User** pagelet shows that the ISSP transaction is ready for approval processing. All ISSP transactions that require approval processing appear on the pagelet. **Approvers should regularly refresh the pagelet to see which items they need to process for approval.**


The approver must notify the user of any items not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

The ISSP Manager who is associated to the ISSP location approves the transaction on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.

Note: Additional information about ISSP processing is provided in the **Mancon** job aid.



ISSP Approval (continued)



[Favorites](#) | [Main Menu](#)

[Personalize](#) | [Content](#) | [Layout](#)

PCard Verified Charges by User

Name	Trans Date	Merchant	Sum Amount
Bristol.District	2011-01-04	MANAGEMENT CONSULTING INC	12105.6
Bristol.District	2011-01-04	MANAGEMENT CONSULTING INC	85.62
Bristol.District	2011-01-04	MANAGEMENT CONSULTING INC	126.91
Bristol.District	2011-01-04	MANAGEMENT CONSULTING INC	38.86



ISSP Approval (continued)

Each ISSP approver must set up the appropriate pagelet in order to process ISSP approvals. Please note that this pagelet contains both PCard and ISSP transactions.


The steps to set up the pagelet are:

- From the Cardinal Home Page, click on **Personalize Content**.
- Click the checkbox for **PCard Verified Charges by User** to select it, then click **Save**.

Refresh and check this pagelet daily, and take appropriate action (i.e., approve or deny the transactions).



ISSP Approval (continued)

 **CARDINAL™**

Personalize Content

Welcome Message:

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

- ☐ [myCardinal Messages](#)
- ☒ [myCardinal Financials](#)
- ☒ [PCard Verified Charges by User](#)
- ☒ [Menu - Classic](#)

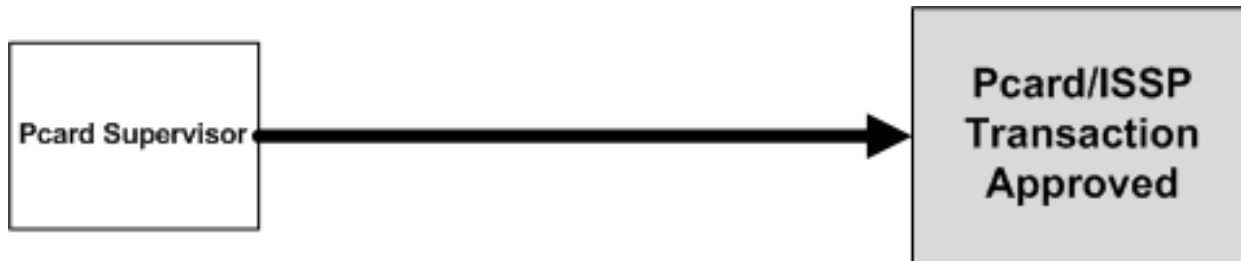
[Return to Home](#)



ISSP Approval (continued)

ISSP transactions require one level of approval:

- **ISSP Manager:** The ISSP Manager who is associated to the card (i.e. not the user's Supervisor) is the only level of approval.
 - This approver can approve the transaction, enter a dispute amount if the amount is incorrect, or notify the user if there is an issue with the transaction
 - Cardinal does not generate an automatic email to the PCard Holder when the ISSP transaction is approved. The approver must do so manually, if necessary. Users can also search for their transaction in Cardinal and check on its approval status.





ISSP Approval (continued)

ISSP transactions are approved on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet. You can navigate to the pagelet through the following path:

Main Menu > PCard Verified Charges by User (the pagelet can be accessed on the Home page as shown previously)

The following path is an alternative path to the **Reconcile Statement** page:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile

The screenshot displays the 'Reconcile Statement' page for 'Procurement Card Transactions'. It includes a navigation breadcrumb: 'Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement'. Below the title, there are checkboxes for 'Display Unmasked Card Number' and 'Run Budget Validation on Save'. A 'Bank Statement' section shows a table of transactions with columns for Transaction, Employee Name, Card Issuer, Card Number, Trans Date, Merchant, *Status, Transaction Amount, and Currency. The table lists three transactions, all with a status of 'Staged'.

Transaction	Employee Name	Card Issuer	Card Number	Trans Date	Merchant	*Status	Transaction Amount	Currency
1 <input checked="" type="checkbox"/>	District, Bristol	ISSP0	*****120V	12/28/2012	MANAGEMENT CONSULTING INC	Staged	156.12	USD
2 <input type="checkbox"/>	District, Bristol	ISSP0	*****120V	12/30/2012	MANAGEMENT CONSULTING INC	Staged	407.30	USD
3 <input type="checkbox"/>	District, Bristol	ISSP0	*****120V	01/03/2013	MANAGEMENT CONSULTING INC	Staged	337.58	USD



ISSP Approval Steps

To approve an ISSP transaction:

- Click on the link for the transaction you wish to review in the **PCard Verified Charges by User** pagelet.
- Review all details based on relevant policies.
- You have two options:
 - Click on the **Approve** button to submit your approval.
 - If the transaction amount is incorrect, you can enter a dispute amount for the transaction.
 - On the **Billing** tab, enter the dispute amount for the transaction in the **Dispute Amount** field.
 - Click the **Comment** icon on the **Transaction** tab to enter a comment about the transaction. The comment should explain why the transaction is being disputed.
 - Then set the transaction status to **Approved**.
 - The agency pays the full amount and receives a credit for the amount you dispute, if it is incorrect.
- Notify the user of any item not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

Approved transactions are transmitted to FleetFocus M5 (Equipment Management System) and also to the Accounts Payable module where vendor payments are processed. Please note that ISSP transactions are paid on verified



ISSP Approval Steps (continued)

Reconcile Statement

Procurement Card Transactions

Empl ID: PRNON Name: Bristol, District
Card Number: *****200 Card Provider: ISSP0

☐ Run Budget Validation on Save

Bank Statement

Customize | Find | View All | | First 1 of 1 Last

Transaction

Billing

		Trans Date	Merchant	*Status	Transaction Amount	Currency			Budget Status	Chartfield Status	Redistrib	Voucher	
1	<input checked="" type="checkbox"/>	01/04/2011	MANAGEMENT CONSULTING INC	Verified	38.86	USD				Valid	Valid	Yes	No

☒ [Select All](#) ☐ [Clear All](#) [Stage](#) [Verify](#) [Approve](#) [Validate Budget](#)



Lesson 7: Procurement Contract Approval

All Procurement contracts entered in Cardinal require approval. A contract is ready for approval after the Purchasing Contracts Administrator has created the contract and reviewed it.

The Purchasing Contracts Administrator then sets the Procurement contract Status to **Approved** to allow transactions to be processed against the contract. There is no workflow notification associated with contracts.

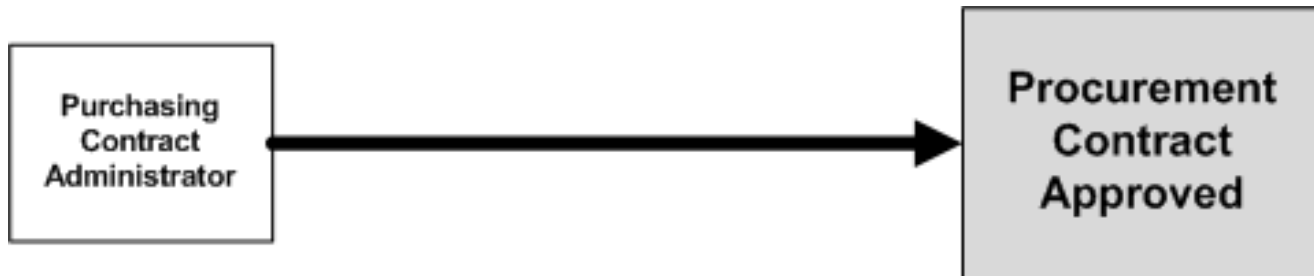
The Purchasing Contracts Administrator approves the contract on the **Add/Update Contracts** page. See the **Entering Procurement Contracts** course for more information about procurement contracts.



Procurement Contract Approval (continued)

Procurement contracts require one level of approval.

- **Purchasing Contracts Administrator:** Follow the appropriate agency policies and procedures for any manual evaluation, processing, and approval required for contract approval.





You can navigate to this page through the following path:

To approve a Procurement contract:

- To approve the contract click the **Status** drop-down box, select **Approved**, and then **Save**.
- If a threshold was met, updates to the contract may also be needed and the contract will need to be reapproved. For example, if the contract's expiration date has expired and it is updated, the contract will need to be reapproved.

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Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the questions, select your answers and click **Submit** to see if you chose the correct response.



Approvers can approve or deny parts of a requisition or purchase order?

- ☐ True
- ☐ False

Which of the following Procurement items are approved through a pagelet?

- ☐ Requisitions
- ☐ Contracts
- ☐ PCard and ISSP transactions
- ☐ None, they are all approved on the page or through the worklist



Course Summary

In this course, you learned:

- Issuance requisitions do not require a workflow approval process. They are automatically approved once the **Submit for Approval** button is clicked. Restock requisitions require a workflow approval process, which follows the same process as a regular requisition.
- Requisitions and POs time out, i.e. they route to the next approver or to the approver's Supervisor for processing if not processed within 48 hours.
- Change orders have different levels of approval, depending on the amount of the difference from the originally approved PO.
- A collaborator can be added at the beginning or at the end of a Strategic Sourcing event to provide input into the event.
- PCard and ISSP transactions are approved from a pagelet or directly from the **Reconcile Statement** page. Approvers must set up the **PCard Verified Charges by User** pagelet in order to access items for approval from the pagelet. Approvers should check and refresh this pagelet daily, and process the items listed.
- The Purchasing Contracts Administrator sets the Procurement Contract to **Approved** to allow transactions to be processed against the contract. There is no workflow associated with contracts.



Course Evaluation

Congratulations! You have completed the **PROC343: Procurement Approvals** course. Please use the evaluation link to assess this course.

[Click here to access the survey](#)

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the Exit Course button.

